

**NOTICE OF PROPOSED CLASSIFICATION ACTIONS BY
THE HUMAN RESOURCES DIRECTOR**

The following actions are being posted in accordance with Rule 109. In the absence of requests to meet addressed to the Human Resources Director, the proposed changes will become final seven (7) calendar days from the posting date.

Posting No: 02
Fiscal Year: 2010/2011
Posted Date: July 01, 2010

AMEND THE FOLLOWING JOB SPECIFICATION(S):
(Draft job specifications attached.)

Item #	Class/Title
1	4337 Principal Investigator, Tax Collector

Item #	Class/Title
2	8141 Worker's Compensation Adjuster

For additional information regarding the above proposed action, please contact Cathy Abela at (415) 557-4933 or email her at Cathy.Abela@sfgov.org.

Requests to meet on an item should be addressed to the Human Resources Director, 1 South Van Ness, 4th Floor, San Francisco, CA 94103. All requests must be received in writing no later than close of business seven (7) calendar days from the posting date. FAX'd copies will be accepted as timely with original to follow. Copies of this notice may be obtained from the Information Center, 1 South Van Ness, 4th Floor or from DHR's website at:

<http://sfdhr.org/index.aspx?page=109>

cc: All Employee Organizations
All Departmental Personnel Officers
Anita Sanchez, CSC
Harvey Rose, Budget Analyst
Christina Fong, DHR
Carmela Villasica, DHR
Linda Cosico, DHR
RAS Team Leader(s)
DHR Support Services
Martin Gran, DHR
Steve Ponder, DHR
Cathy Abela, DHR
Clare Leung, MTA
Suzanne Wong, MTA
File

**CITY AND COUNTY OF SAN FRANCISCO
DEPARTMENT OF HUMAN RESOURCES**

Title: PRINCIPAL INVESTIGATOR, TAX COLLECTOR
Job Code: 4337

INTRODUCTION

Under the direction of the Director of the Bureau of Delinquent Revenue Deputy Tax Administrator or designee, this position administers the enforcement and collection of delinquent third party, local and state taxes and fees, unregistered businesses, issuance of Notice of Violations and Citations and summary of judgments, ~~the Third Party regulations~~ by assigning, supervising, assessing, and monitoring staff (~~investigators and auditors~~) performance in the collection and investigations process, evaluating and analyzing field investigative research and surveys, and ~~reviewing the performance of field surveys and of delinquent accounts and enforcing local, state and federal laws and regulations.~~ Performs related work as required.

DISTINGUISHING FEATURES

This is the highest level in the Investigator series. It is distinguished from the 4335 Senior Investigator by its supervisory duties and responsibility for performing more difficult and complex investigative work.

SUPERVISION EXERCISED: Supervises the 4334 Investigator and 4335 Senior Investigator, Tax Collector.

MAJOR, IMPORTANT, AND ESSENTIAL DUTIES

According to Civil Service Commission Rule 109, the duties specified below are representative of the range of duties assigned to this job code/class and are not intended to be an inclusive list.

1. Supervises investigators, monitoring and evaluating performance, including field and in-house collection/investigation activities, providing coaching and direction when needed to ensure performance expectations are met and procedures and policies are followed; provides feedback and drafts performance plans and appraisals; provides training and instruction to new investigators that includes but is not limited to unit procedures, enforcement tools and legal collection measures, systems, field safety and local, state and federal tax laws and regulations; assists with the supervision of other section staff as needed.
2. Audits staff performance and provide monthly feedback to staff including but not limited to the recognition of excellent and below average performance by properly documenting the facts discovered; assists with the development of the staff by providing alternative methods of reaching the performance goals.
3. Supervises field investigation activities including but not limited to surveying for unregistered businesses, parking garages and lots and hotels; issuance of notice of violations, and citations and the filing of summary of judgments and court order enforcement; reviews and maintains field investigation records and reports provided by investigators and, when needed, prepares reports on status of specific accounts; re-evaluates businesses for proper

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classification or exemption.

4. Creates and/or develops programming specifications and manages a comprehensive Geographic Information System (GIS) tracking system to monitor field investigation survey results; coordinates and strategizes field investigation operations; compiles and provides GIS statistical data and reports for the purpose of analysis and increase collection and enforcement production; maintains the application integrity and reliability of the program by enforcing accurate data updates.
 5. Responds to complaints received regarding parking, hotel operations and businesses that may be in violation of local and county tax ordinances and regulations; issues citations for violations of the Municipal Code as required.
 6. Reports status of field assignments and special projects to the Director of the Bureau of Delinquent Revenue or designee, and informs other related sections as directed or needed.
 7. Collaborates with Legal Section to interpret complex ordinances, state codes, and federal laws and/or to expedite or enforce collection of delinquent taxes and fees; assists the attorney in the preparation and prosecution of cases by reviewing the accounts for document completeness prior to final litigation; represents the City and County as a witness when needed.
1. Responds to complaints received regarding parking operations; conducts field investigations to establish need for field audits of Third Party Taxpayers, and issues citations for violations of the Municipal Code as required.
 2. Surveys procedures of other jurisdictions to ensure the City maintains the highest standards practiced in Third Party Tax compliance for municipal jurisdictions.
 3. Reports status of field assignments and special projects to Deputy Tax Administrator, and informs the Chief Auditor of Business Taxes or other related sections as directed.
 4. Works closely with Legal Section to expedite collection of delinquent parking taxes; assists the attorney in the preparation and prosecution of cases by reviewing the accounts for document completeness prior to final litigation; and represents the City and County as a witness.
 5. Testifies in court on status of field surveillance or investigations conducted to establish parking or other Third Party tax liability violations.
 6. Gathers relevant information from taxpayer, public, and private associations regarding the debtor's location, assets, and liabilities, and utilizes other current skiptracing techniques.
 7. Interprets complex ordinances, state codes, and federal laws to explain obligation to the taxpayer.
 8. Reviews, prepares, and maintains field investigation records and reports on status of accounts.
 9. Supervises field surveys for unregistered businesses, parking garages, and lots; re-evaluates businesses for proper classification or exemption.

IMPORTANT AND ESSENTIAL KNOWLEDGES, SKILLS, AND ABILITIES

Knowledge of: Revenue and Taxation Code, Business Tax Ordinance, Enforcement of Judgments Act and permit ordinances; modern methods, policies, procedures used in collection/investigations; and escrow, bankruptcy, small claims, bounced-check procedures and post-judgment creditor remedies.

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Ability to: Perform efficiently and professionally in a stressful environment; assign, supervise, and review work of subordinate investigators; interpret pertinent laws, ordinances, rules, and regulations; lead by example and maintain professional and productive working relationships; solve problems and provide clear direction and instructions; interpret pertinent laws, ordinances, rules, and regulations; use effective verbal and written communication skills communicate and exercise sound judgment in evaluating situations with tact, firmness, and courtesy in dealing with debtors and staff; and analyze complex information and prepare clear, concise, and accurate reports.

MINIMUM QUALIFICATIONS

These minimum qualifications are to be used as a guide for establishing the education, training, experience, special skills and/or license(s) which are required for employment in the class. Please note, additional qualifications (i.e., special conditions) may apply to a particular position and will be stated on the exam/job announcement.

1. Possession of a Bachelor's Degree from an accredited college or university; AND
2. Possession of a valid Driver's License; AND
- 3a. Two years of verified professional work experience as the manager, supervisor, or senior investigator of a governmental field tax collection and investigation unit involved in the collection and investigation of delinquent tax obligations. This experience must include supervising lower-level field tax collection/investigation staff and/or directing, developing and implementing programs and policies relevant to the collection/investigation of delinquent tax obligations; OR
- 3b. Five years of verified professional work experience as an investigator of a governmental field tax collection/investigation unit involved in the collection and investigation of delinquent tax obligations.

SUBSTITUTION:

Additional verified experience as a professional investigator (as listed under minimum qualification 3a or 3b) may be substituted for required education on a year-for-year basis--one year of experience is equivalent to 30 semester or 45 quarter units.

LICENSE AND CERTIFICATION

PROMOTIVE LINES

FROM: 4334 Investigator, Tax Collector
4335 Senior Investigator, Tax Collector

ORIGINATION DATE: 2/24/69

**CITY AND COUNTY OF SAN FRANCISCO
DEPARTMENT OF HUMAN RESOURCES**

Title: PRINCIPAL INVESTIGATOR, TAX COLLECTOR
Job Code: 4337

AMENDED DATE: 4/28/00, 7/1/10

REASON FOR AMENDMENT *To accurately reflect the current tasks, knowledge, skills and abilities defined in the most recent job analysis conducted for this job code.*

BUSINESS UNIT(S): COMMN

**CITY AND COUNTY OF SAN FRANCISCO
DEPARTMENT OF HUMAN RESOURCES**

Title: WORKERS' COMPENSATION ADJUSTER
Job Code: 8141

INTRODUCTION

Under direction, is responsible for adjusting claims ~~of employees of the City & County of San Francisco~~ and performing other related duties as required for the Workers' Compensation Division of the Department of Human Resources. Essential functions include reviewing and determining liability of workers' compensation claims for injured employees; authorizing medical treatment in consultation with medical experts when necessary; determining and authorizing all indemnity payments; establishing and maintaining adequate reserves on claims within authorized level; interpreting and explaining workers' compensation laws; negotiating and settling claims within authority level on behalf of the City and County of San Francisco; providing direction to claims assistants; preparing various reports and correspondence; conducting effective interviews; and contacting and interacting with client departments. The duties of the job require extensive use of personal computers and telephones.

DISTINGUISHING FEATURES

The Workers' Compensation Adjuster is a professional journey level class and is distinguished from the next higher level of 8165 Workers' Compensation Supervisor I in that the latter acts either as a first-line supervisor to a group of adjusters, ~~or coordinates a state-mandated vocational rehabilitation program in the Workers' Compensation Division.~~

SUPERVISION EXERCISED: The 8141 Workers' Compensation Adjuster provides work direction to claims assistants.

MAJOR, IMPORTANT, AND ESSENTIAL DUTIES

According to Civil Service Commission Rule 109, the duties specified below are representative of the range of duties assigned to this job code/class and are not intended to be an inclusive list.

1. Reviews and determines the liability of workers' compensation claims for injured workers within the time limits set by the California Labor Code on Workers' Compensation, by reviewing reports of accidents, analyzing and investigating written and telephone reports of injuries sustained by employees on duty, and authorizing investigations when necessary. Interprets the California Labor Code and applies the workers' compensation laws to determine compensability for each claim and class of benefits, such as temporary disability, permanent disability, ~~vocational rehabilitation~~, death benefits, disability pay, and medical treatment.
2. Authorizes and monitors medical treatment in consultation with medical experts when needed by requesting medical reports and records, arranging medical evaluations and writing to treating physicians for status reports; monitors physician compliance with California Labor Code; assists in the review of medical bills for fee schedule and contract adherence, as well as appropriateness and payment discrepancies. Interprets and applies medical knowledge and terminology to determine the appropriate course of action.
3. Establishes and maintains adequate reserves on claims within authorized level to reflect potential value of the claim by examining medical reports and calculating various types of

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benefits.

4. Interprets workers' compensation laws to employees, departments, state and federal agencies, doctors, relatives and representatives of employees, as well as members of the public. Addresses, questions, and responds to injured workers, departments, physicians, attorneys, and other vendors regarding issues.

5. Negotiates and settles claims within authorized level on behalf of the City and County of San Francisco by means of Stipulated Award or Compromise and Release; supplies litigation support by providing files and settlement authority to the City Attorney; recognizes subrogation potential and refers to the City Attorney's Office in a timely manner.

6. Provides direction to claims assistants in areas such as preparing benefits payments, issuing notices, responding to the injured workers' requests, clarifying pay issues, preparing general correspondence for the medical reports and claims, and other tasks as needed.

7. Prepares reports, memoranda, file notes, and other correspondence to various individuals/parties such as management, client departments, attorneys, and medical providers.

8. Conducts effective interviews to collect and analyze information related to industrial injury or illness.

9. Contacts and interacts with client departments frequently to provide information and address specific requests.

10. Determines and authorizes all indemnity payments including temporary disability, permanent disability, death benefits, vocational rehabilitation maintenance allowance, life pension, and disability pay.

11. Performs related duties and responsibilities as assigned.

IMPORTANT AND ESSENTIAL KNOWLEDGES, SKILLS, AND ABILITIES

Knowledge of: California Workers' Compensation laws and medical terminology.

Ability to: research and investigate; analyze medical and investigative reports and apply knowledge of appropriate laws to make determinations; plan, organize, and prioritize tasks in the appropriate order to meet deadlines; speak and write in a clear, understandable, and concise manner to explain complex terms and ideas; establish and maintain effective working relationships; calculate accurate rates and awards; and access, update, and maintain files using various computer systems and software.

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Title: WORKERS' COMPENSATION ADJUSTER
Job Code: 8141

MINIMUM QUALIFICATIONS

These minimum qualifications are to be used as a guide for establishing the education, training, experience, special skills and/or license(s) which are required for employment in the class. Please note, additional qualifications (i.e., special conditions) may apply to a particular position and will be stated on the exam/job announcement.

- 1 a. Possession of a baccalaureate degree from an accredited college or university; AND
- 1 b. One (1) year of verifiable experience ~~as-a~~ adjusting California workers' compensation claims adjuster; OR

- 2 a. Completion of two (2) years college-level course work; AND
- 2 b. A certificate in California Workers' Compensation Claims Administration from the Insurance Educational Association or equivalent certificate in Basic Workers' Compensation from the Industrial Claims Association; AND
- 2 c. One (1) year of verifiable experience ~~as-a~~ adjusting California workers' compensation claims adjuster; OR

- 3 a. A certificate in California Workers' Compensation Claims Administration from the Insurance Educational Association or equivalent certificate in Basic Workers' Compensation from the Industrial Claims Association; AND
- 3 b. Four (4) years of verifiable experience with any combination of experience as a California workers' compensation claims adjuster and/or a claims assistant.

SUBSTITUTION FOR MINIMUM QUALIFICATIONS #1 AND #2: Additional experience as a California workers' compensation claims adjuster may be substituted for the college education on a year-for-year basis. One year of verifiable experience equals thirty (30) semester or forty-five (45) quarter units.

LICENSE AND CERTIFICATION

PROMOTIVE LINES

TO: 8165 Workers' Compensation Supervisor I.

ORIGINATION DATE: 3/10/86

AMENDED DATE: 1/12/01, 5/17/02, **6/29/10**

REASON FOR AMENDMENT *To accurately reflect the current tasks, knowledge, skills and abilities defined in the most recent job analysis conducted for this job code.*

BUSINESS UNIT(S): COMMN